

CATHOLIC INVESTMENT TRUST  
ACCOUNT UPDATE FORM



Diocese of Toledo Account Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_

**CONTACT UPDATE:**  Add  Remove

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_ Fax No: \_\_\_\_\_

Email: \_\_\_\_\_

Establish New KeyLink Access? Yes  only select yes if you don't currently have access)

**INVESTMENT ELECTION UPDATE:**

	Existing Allocation	New Allocation
Investment in Money Market Fund	_____ %	_____ %
Investment in Fixed Income Pool	_____ %	_____ %
Investment in Balanced Pool	_____ %	_____ %
Investment in Long Term Pool	_____ %	_____ %
Investment in Aggressive Growth Pool	_____ %	_____ %
<b>TOTAL (must equal 100%)</b>	_____ %	_____ %

**INCOME DISTRIBUTION ELECTION UPDATE (Automatic Distributions)**

Options:  Monthly  Quarterly  Annually  Reinvest all income

**Method of Distribution:**

Issue Check to Parish/Entity Name: \_\_\_\_\_

Direct Distribution to checking or savings account – please complete below:

Financial Institution: \_\_\_\_\_

Account Name: \_\_\_\_\_

Account No: \_\_\_\_\_

If other than KeyBank ABA (Routing) No: \_\_\_\_\_

**\*\*PLEASE NOTE THAT ACH IS THE PREFERRED/ MORE SECURE METHOD OF DISTRIBUTION**

**Authorization Section – Must Be Completed**

Authorized Signature: \_\_\_\_\_

Printed Name and Title: \_\_\_\_\_ Date: \_\_\_\_\_

Return this form to: [catholic\\_diocese@keybank.com](mailto:catholic_diocese@keybank.com) Or

KeyBank

Attn: Randy Englund

300 Madison Ave, Suite 1500

Toledo, OH 43604

**\*\* All e-mails must be Cc'd to your Pastor or equivalent AND Rene Schmidbauer @ [rschmidbauer@toledodiocese.org](mailto:rschmidbauer@toledodiocese.org)**

\*\*\*\* FORMS RECEIVED AFTER THE 25<sup>TH</sup> ARE PROCESSED THE FOLLOWING MONTH \*\*\*\*

\*\*\*QUESTIONS RELATED TO FILLING OUT THE FORM CALL RANDY ENGLUND 419-259-8218

The investment election on this form continues in effect until future changes are acknowledged in writing and provided to the corporate trustee Transfers from funds occur monthly.